

SOP Document for Level9Virtual — “Client Onboarding & VA Assignment SOP”

Title: Level9Virtual — Client Onboarding & VA Assignment Standard Operating Procedure

Purpose: To ensure that every new client of Level9Virtual is onboarded smoothly, assigned the appropriate Virtual Assistant (VA) or VA-POD, and that expectations, workflows, and communication are clearly established to guarantee quality, accountability, and a great working relationship.

Scope: Applies to all new clients who engage Level9Virtual services (Dedicated VA, VA POD, Live Answering, Website Build, etc.). All onboarding and VA assignment staff must follow this process.

Procedure

1. Client Intake & Needs Assessment

1.1 Send the “Role Description Form (RDF)” to the prospective client to gather details:

- Business name, website, industry
- Scope of work (tasks needing support), preferred service type (Dedicated VA, POD, Live Answering, Project-based) [Level9 Virtual+2Level9 Virtual+2](#)
- Expected hours (full time, part time, or monthly hours) or project needs
- Special requirements: skills needed (e.g. CRM, marketing automation, web dev, graphic design, social media, etc.) [Level9 Virtual+1](#)
- Preferred timezone, communication preferences, and reporting expectations

1.2 Review client's requirements internally to determine suitability and resource availability.

1.3 Confirm service pricing and flat-rate plan (if Dedicated VA or POD) or project fee (for website builds or one-time projects) based on the service selected by client. [Level9 Virtual+2Level9 Virtual+2](#)

1.4 Present the contract/agreement (flat-rate subscription or project-based) to client with terms: no hidden fees, payroll & compliance handled by Level9Virtual, month-to-month subscription (after minimum 90 days if applicable) [Level9 Virtual+1](#)

1.5 Upon agreement, proceed to onboarding.

2. VA Matching & Assignment

2.1 Use Level9Virtual's proprietary **Personality and Skills Profile Match (PSPM)** system to pick a VA (or VA team) whose skills and personality fit the client's needs. [Level9 Virtual+1](#)

2.2 For full-service or POD clients, assemble a VA team (if multiple skill sets needed: e.g. admin + design + marketing + dev). Assign a Project Manager (PM) if required. [Level9 Virtual+2](#)[Level9 Virtual+2](#)

2.3 Provide the client with the assigned VA's profile / short bio (skills, role, communication channel, timezone). Offer a brief "Intro & Alignment" call (if needed) to align expectations.

2.4 Set up tracking & management tools:

- Use time-tracking app (e.g. Time Doctor 2) to monitor hours, breaks, and screenshots for productivity verification. [Level9 Virtual+1](#)
- Use project management / communication tools (e.g. Asana, Slack, or equivalent) to assign tasks, manage communication, and store deliverables.

2.5 Ensure access credentials: provide access for VA to necessary systems (CRM, websites, ad accounts, design tools, etc.) as per the client's requirements.

3. Onboarding & Initial Setup

3.1 Provide the VA with an onboarding brief:

- Client context: business overview, services/products, brand guidelines (if any), tone & style preference
- Task list: first batch of tasks — admin, outreach, content, or project-based
- Communication protocol: how and when to report, daily/weekly updates, lines of escalation

3.2 Client/VA Kickoff Meeting (optional but recommended):

- Introduce VA to client (video call or chat)
- Clarify deliverables, timelines, feedback schedule
- Agree on milestones, deadlines, and expected work hours

3.3 First 48–72 hours: Monitor VA's performance closely, ensure connectivity, access, and confirm that VA understands tasks and client expectations.

4. Ongoing Management, Reporting, and Quality Assurance

4.1 Daily or weekly reporting by VA:

- Tasks completed
- Tasks pending
- Issues or blockers

4.2 Client feedback session (weekly or biweekly for first month) to gauge satisfaction and to correct course if needed.

4.3 Internal support from Level9Virtual SME / support team available for VAs if they encounter problems — e.g. tool/setup issues, training, or skill gaps. [Level9 Virtual+1](#)

4.4 Payroll & HR compliance are handled by Level9Virtual — clients don't need to manage salary transfers, benefits, or compliance. [Level9 Virtual+1](#)

4.5 Performance reviews every month (or after defined period) to ensure VA maintains productivity and quality. If VA fails, re-match or replace as per agreement.

5. Project Completion / Transition / Scaling

5.1 For project-based work (e.g. website build, one-time campaign, ad setup) — after deliverables are complete, conduct final review with client, gather feedback, obtain approval/payment, and archive project documentation.

5.2 For ongoing subscriptions (Dedicated VA / POD): continue regular reporting, performance reviews, scaling up/down hours as needed, and manage workload accordingly.

5.3 If client wants to add or change services (e.g. add ads management, social media, design) — repeat matching process to assign additional VAs or POD resources.

5.4 Maintain a record of deliverables, communications, and client history in internal CRM for future reference.

Revision History:

- Version 1.0 — initial SOP — (Date)
- Version 1.1 — added VA POD assignment and project-based flow — (Date)